

2004 Medical Devices Technology Leadership of the Year Award

Award Recipient: Align Technology, Inc.

Written by: Katherine Austin

Award Description

Frost & Sullivan's Technology Leadership of the Year Award is bestowed upon the company that has pioneered the development and introduction of an innovative technology into the market; a technology that has either impacted or has the potential to impact several market sectors. This award recognizes a company's successful technology development that is expected to bring significant contributions to the industry in terms of adoption, change, and competitive posture. It also recognizes the leadership of the company in the successful promotion of the technology and its continuing impact in technology commercialization.

Research Methodology

To choose the award recipient, Frost & Sullivan's analyst team tracks technology innovation in key hi-tech markets. The selection process includes primary participant interviews and extensive primary and secondary research via the bottom-up approach. The analyst team shortlists candidates on the basis of a set of qualitative and quantitative measurements. The analyst also considers the pace of technology innovation, the potential relevance or significance of the technology to the overall industry. The ultimate award recipient is chosen after a thorough evaluation of this research.

Measurement Criteria

In addition to the methodology described above, there are specific criteria used to determine the final rankings. The recipient of this award has excelled based on one or more of the following criteria:

- Significance of the technology in the industry
- Competitive advantage of technology vis-à-vis competing ones
- Potential of technology to become an industry standard or degree of acceptance in the market place
- Breadth of intellectual property ownership
- Recognition by industry participants as to the leadership of a company in this technology
- Impact of technology in terms of shifting R & D focus
- Degree of technology adoption in industry product lines or strategies

Award Recipient: Align Technology, Inc.

The Frost & Sullivan 2004 Medical Devices Technology Leadership of the Year Award has been bestowed upon Align Technology, Inc. in recognition of the company's

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technology leadership and innovation, both in product development and in new rapid-manufacturing processes in the field of dentistry and orthodontia.

Align Tech has developed the "Invisalign" system for orthodontics. Because it does not rely on the use of cemented metal or ceramic brackets and wires, Invisalign significantly reduces the aesthetic and other limitations associated with standard braces. Instead, Invisalign uses clear plastic spacers to move teeth into alignment. Statistics have shown that up to 80% of patients needing orthodontia can be treated with the system. It is especially helpful for adults who might otherwise avoid braces for cosmetic reasons.

Invisalign has two primary components: a computerized component called "ClinCheck", and "Aligners" that actually move the teeth into proper formation. ClinCheck is an Internet-based application that allows orthodontists to simulate treatment in three dimensions by modeling two-week stages of tooth movement. The Aligners are thin, clear, removable dental appliances that correspond to each stage of the simulation. Each Aligner is custom made for the individual patient, and is worn over the teeth for two weeks before being replaced by the next in the series, until treatment is complete. The aligners can be removed for eating, brushing, and flossing, which increases patient comfort and also keeps the teeth cleaner and less prone to cavities than standard braces.

During a patient's initial consultation, the orthodontist or dentist makes impressions of their teeth, takes X-rays, and creates a treatment plan. These are then sent to Align's U.S. laboratory, where computer imaging transforms them into a highly accurate 3-D digital image of the teeth. This image is then manipulated to create images for the intermediate stages needed to gradually move the teeth to their desired final position. Using the Internet, the doctor reviews the patient's ClinCheck file, and, if necessary, adjustments to the depicted plan are made.

Finally, the system uses proprietary software (developed with Raindrop Geomagic, Inc.) to build a set of models that reflect each stage of the treatment plan. A customized set of aligners is made from these models and sent to the doctor. Align has become one of the largest mass manufacturers of a custom product in the world, with approximately 100,000 consumers in treatment. Because each patient's teeth are different from all others, the company uses a cutting-edge, high-volume, customized manufacturing process to produce the individual Aligners. The Invisalign system uses 3D scanning hardware, automatic surfacing software, 3D animation programs, and rapid stereolithographic manufacturing systems.

Over 70% of all U.S. orthodontists are certified to treat patients with Invisalign. Another difference between Invisalign and standard braces is that the Aligners can be installed and followed by general-practitioner dentists as well as orthodontists, which should further increase both patient access and the company's market share. A conservative estimate for the orthodontics market is around \$10 billion per year in the US alone. In April 2002, the San Jose Mercury News ranked Align the number

one fastest-growing company in Silicon Valley. Revenues for 2003 were over \$120 million, an increase of almost 100% over the previous year. These numbers are indicative of the popularity of Invisalign and demonstrate the rapidly growing demand for this product.

Because the company has created an entirely new concept for a well-established product technology (i.e., orthodontia), and because it has been on the cutting edge in developing rapid-manufacturing technology for customized products, Align Technology has been recognized with the Frost & Sullivan Award for Medical Devices Technology Leadership of the Year.

Medical Devices 2004

*Growth Opportunities, Technology Directions,
Marketing Innovations, and Regulatory Strategies
Catapulting Market Performance*

March 21-25, 2004, San Francisco, CA

ANNUAL EXECUTIVE SUMMIT

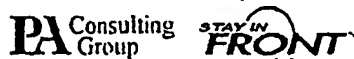
Executive Forum, General Session & Main Exhibition,
Executive Exchange, Tour, Toast and Taste of Napa Valley

- Monday, March 22, 2004: Executive Forum, General Session & Main Exhibition, Executive Exchange, Tour, Toast and Taste of Napa Valley
- Tuesday and Wednesday, March 23-24, 2004: Keynotes, Histories, Thinktanks, Roundtables, Exhibitions, and Networking with Industry Movers and Shakers
- Wednesday, March 23, 2004: Global Excellence in Medical Devices Award Banquet
- Thursday, March 25, 2004: Executive Exchange on Driving Decision Making using CRM Sales and Marketing Analytics

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Dine Around

Previous Participant Profile
3 out of 4
Directors, VPs & CEOs

**Executive Forum:
March 21-22, 2004**

**General Session &
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March 25, 2004**

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Frost & Sullivan provides world-class market consulting on emerging high technology and industrial markets. Now well into its fourth decade, Frost & Sullivan has won a worldwide reputation for high-quality growth consulting and training in more than 20 major industries. As a third-party independent growth and marketing consulting firm, Frost & Sullivan presents unbiased, conclusive information from market leaders and service/solution providers.

Frost & Sullivan's Executive Summits division was launched in the 1970s. Frost & Sullivan Executive Summits provide senior-level management executives with insights into market opportunities, competitive threats, technical trends, emerging markets, and competitive strategies. Frost & Sullivan continues to provide participants with unique, strategic content, competitive benchmarking, industry focus, and the opportunity to network with other key industry executives.

For close to a decade Frost & Sullivan, the world's premier healthcare and life sciences growth consulting firm, has delivered Executive Summits for the medical device industry. We recognize the vital need for a forum that addresses the global environment in which medical device companies now operate. Now in its ninth year, Medical Device 2004 is a uniquely interactive forum for companies going global and seeking an international market niche. It is an annual community of powerhouse industry leaders assembling to confront shared challenges and explore global opportunities. The groundbreaking format promotes networking to a new level, maximizes polarization of ideas among industry cross-sections, and delivers concrete value to your business.

Sunday: A relaxed and fun-filled day for networking, including Tour, Toast and Taste of Napa Valley and a Networking Reception.

Monday: Interactive workshops bring industry executives together to zero in on key challenges in Global Go to Market Strategies. Leading solution providers lead the workshops, and roundtable discussions enable participants to clearly define the challenges they seek to have addressed by workshop leaders and their peers.

Tuesday and Wednesday: All participants unite for general session keynotes, SuperPower panel, Mover and Shaker Live! interview, and executive insights delivering compelling industry thought leadership. Interactive thinktanks, roundtables, Crossfires, and Ask the Experts! Panels guarantee you networking time with your peers to brainstorm hot industry trends and drivers.

Thursday: Find out what to do with all that customer data you have been collecting in an intensive Executive Exchange on Driving Decision-making using CRM Sales and Marketing Analytics.

Executives concerned with the performance of medical device companies including:

- CEOs, president, vice presidents, and directors
- Marketing management
- Corporate strategy professionals
- Finance and operations executives
- Medical directors
- Research and development executives
- Product management
- Sales management
- Regulatory affairs professionals
- Venture capital and other investment firms

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Job Title

Job Title	Percentage
Executive (70% Titles President, VP, Director)	23%
Middle/Product Manager	43%
Other	2%
Press	7%

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Sunday

March 21, 2004

Tour Toast and Taste of Napa Valley

Bring plenty of business cards and be prepared to relax and make new contacts and new friends on a day devoted to delighting all of your senses!

10:00am Executive Coach Bus Departs Hotel for the Napa Valley



Hosted by:



1:00pm Winery Tour with Wine & Cheese Party

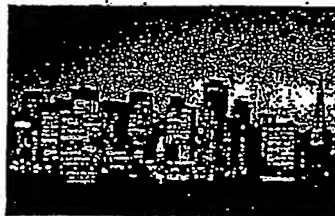
Gift of a bottle of Napa Valley Wine to all Tour Taste & Toast participants Compliments of:



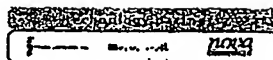
Magnificent Napa Valley vistas are the backdrop for this unique and casual networking event. Visit historical vineyards such as the Robert Mondavi Winery, and forge new relationships while "following the grape" from vine to cellar.

You and your peers will spend a relaxing day exploring California treasures like Beringer Vineyards, the oldest continuously operating winery in Napa Valley, and the historic Inglenook chateau that is now home to the Niebaum-Coppola Estate. Whether you're a novice or an accomplished wine connoisseur this event will entertain and educate. And while you enjoy yourself, meet interesting people in your industry, develop new contacts, and make new friends.

7:30pm Executive Forum Networking Dinner in San Francisco



Hosted by:



Once the sun sets on a glorious day in the wine country, enjoy renowned San Francisco cuisine at our networking dinner. Sit back, relax and reflect upon the day with all of the new friends you made. You'll quickly find that at a Frost & Sullivan Executive Summit, our participants feel a sense of community that they take back to the office. So come be a part of our community and take home more than just a bottle or two of great wine. Hope you'll join us on what promises to be an outstanding networking opportunity.

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Monday

March 22, 2004

Monday Executive Forum: Global Go to Market Strategies: Develop, Launch, Deliver

8:00am Registration, Continental Breakfast, and Exhibition

8:45am Welcome and Overview

9:00am Roundtable Discussions: Solutions to Your Global Go to Market Challenges

Set the stage for the day in this interactive session with your workshop leaders and peers by defining your specific needs and objectives.

10:30am Networking and Refreshment Break

11:00am In the Real World

Executive experiences and thought leadership from a colleague and peer on product development cycles.

Interactive

11:30am Accelerating the Product Development Cycle

Walter Herbst
Chairman / Founding Partner
Herbst, Lazar, Bell

Jeffrey A. DuBois, Ph.D.
Vice President, Business Development
Nova Biomedical

The challenge to medical device companies today is to increase sales through innovation while optimizing R&D and manufacturing. The ability to accelerate R&D and get more of the right products into the market more rapidly has been a major challenge. This workshop is based on continuous studies culminating in a proven process that is supported by case histories. The principal case study will demonstrate how a product progressed from breadboard to a released product in 18 months.

- Recognition of corporate cultures in homogeneous organizations
- OEM market dynamics
- Process for success - experience/skills required
- Case study
- Outsourcing as a strategy

12:30pm Networking Luncheon Featuring Speaker-Hosted Roundtables

1:30pm In the Real World

Drawing from company examples, Bill Watkins, President, The Marena Group Inc. will share insight on the process of delivery, the final stage of an effective Go To Market strategy.

Monday Executive Forum:
Global Go to Market Strategies:
Develop, Launch, Deliver

Monday
March 22nd

Interactive

2:00pm Achieving Fast, More Reliable, and More Profitable Product Launches

Ed Hill
Principal
Chesapeake Consulting, Inc.

A successful product launch begins with the right idea, doesn't stop until that product is generating profits, and requires near-perfect choreography of internal and external resources. One wrong step, and your product launch can be delayed by weeks or months, giving your competition the opportunity to grab the market share you were targeting. In this workshop, we will explore what it takes to choreograph the new product launch for success. Through a facilitated discussion, brainstorming and hands-on exercises, we will identify what works, what doesn't, and why. Be prepared to take practical ideas to implement immediately for improved results.

- What are the real constraints to achieving successful product launches?
- How do we as top managers get in the way? What beliefs and policies are we using that actually impede our organizations' ability to achieve successful product launches?
- What can we do about it?

3:00pm Refreshment, Networking, and Exhibition Break

4:00pm Getting the Biggest Return on Your Product Launch Investment

Christine Clevenger
Vice President- High Tech Industry
SAP America, Inc.

Pete Bussey
Medical Technology Industry Leader
SAP America, Inc.

Bringing a new medical device to market requires a major commitment of corporate resources. How can you maximize the return on these investments? Internal barriers often isolate product development and launch activities from the rest of the business. This separation contributes to launch delays, increased production costs, and poor post-sales customer service. Technology-based solutions can help synchronize product development and launch with the downstream product lifecycle, all the way out to the customer. This workshop will explore how this approach will accelerate time-to-market, improve operational efficiency, and maximize revenue streams. You will create a technology adoption roadmap and take home practical ideas to maximize the results of new product launches.

- Use collaborative design and sourcing to be first to market at the right cost
- Smooth the transition from design to production and post-sales service
- Accurately match supply and demand while hitting delivery targets
- Reach your launch targets with customized product and service offerings

5:00pm Executive Forum Concludes

"The medical device field is a broad waterfront; however, Frost & Sullivan always manages to put together an outstanding program that appeals to everyone's interests. Notwithstanding the top-notch presenters, the networking amongst peers is always enlightening."

- Jerry McLaughlin, President & CEO, CompuMed, Inc.

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Tuesday

March 23, 2004

8:00am Registration, Continental Breakfast, and Exhibition

8:45am Welcome, Icebreaker, and introduction

Keynote

9:00am **Creating a Customer Centric Competitive Advantage**
Richard Atkin
President and CEO
Space Labs Medical

Healthcare has many challenges today, resulting in a drive for a faster, cheaper, better. At a time when competition and cost pressures are highest, medical device companies have to make a strategic choice on how they respond to these challenges. Drawing from his experience with Space Labs, Richard Atkin will illustrate how investing in customer listening has proven to be a winning strategy enabling this mid-sized medical technology company to successfully compete with much larger competitors.

- 'Customer First' as the core strategy for a sustainable and viable business
- Customer Listening starts with values and beliefs
- Learn how to implement the necessary culture changes to develop a passion for Customer Listening
- See the benefits achieved, lessons learned and pitfalls to avoid

Interactive

9:45am **Superpower Panel: Propelling Breakthrough Technology**

A distinguished panel examines key technology issues, including fostering innovation; visibility of innovation to upper management; creating business and financial models for early stage new concepts; separation of new technology development from new product development and market penetration models for "break-in" technology.

PANELISTS INCLUDE:

Jim Welch
Chief Technology Officer
Welch Allyn, Inc.

Fred Cohen
Senior Vice President and Chief
Technology Officer
Boston Scientific

Lonnie M. Smith
President and Chief Executive Officer
Inovative Surgical

Rodney J. Williams
President
Andromed

David M. Sheehan
President and CEO
Diprind

10:45am Refreshment and Networking Break

Executive Bulletin

11:15am **Going Global**

Successful global companies understand what their core capabilities are, nurture them throughout the organization, and transfer those skills on short notice into new markets around the world. Easier said than done. Investors in today's market are often not willing to wait for markets to develop. Medical device companies must make the greatest possible use of local resources, contacts and market knowledge in order to penetrate the market as rapidly as investors require. MrX will provide a first-person account of market entry success strategies and pitfalls to avoid.

- Market prioritization and focus
- SWAT approach to local market development
- Global product, local marketing and sales, management structures
- Product attributes and flexible entry strategies depending on local market conditions

Interactive

12:00pm **Solutions Wheel**

Participants will have the opportunity to join a series of rapid-fire, one-on-one meetings with leading vendors in the market. Play the "wheel" to gain a first-hand comparative evaluation of solutions available in the market today.

12:30pm **Networking Luncheon Featuring Speaker-hosted Roundtables**

Interactive

1:30pm **Concurrent ThinkTank**

Join us for these structured interactive brainstorming sessions facilitated by industry experts. This is your opportunity to get together with your peers to engage in problem-solving common challenges. Select one of the following thinktanks (TT1, TT2, TT3):

TT1 - Many Tongues, One Voice - Global Brands in Local Markets

FACILITATOR:

Kevin Tausend
Vice President
Bowne Global

Join us to discuss and debate the cultural and regulatory challenges surrounding global branding and communications in the Medical Device Industry. Discover how your colleagues and industry experts strike the proper balance between a global message and local market nuance.

- Learn about innovative approaches to deploying in-country, "local" marketing campaigns
- Focus on the "Worldwide" aspect of the World-Wide-Web and its value to you as a global marketing channel
- Explore the global/local balance, and how to adapt your communications channels to support locally appropriate and compliant messages with global marketing objectives
- Discover new ways to shorten your regulatory review cycle by streamlining the translation process
- Face the hard challenges of globalization - cost, time-to-market, and quality of message - with new insights and better strategies

TT2

Market Expansion through M&A

TT3

Reimbursement Planning

3:00pm **Networking and Refreshment Break**

Interactive

3:30pm **Ask the Experts Panel
International Distribution Challenges and Opportunities**

International distribution has become a strategic imperative. Distribution strategies must be aligned to corporate strategies. There are a host of risks that must be considered, along with crucial decisions including direct vs. foreign distribution; strategic distribution alliances and their implications; and reimbursement and regulatory issues.

PANELISTS INCLUDE:

Richard Russo
Executive Vice President and
General Manager International
Osteotech, Inc.

Brian T. Ennis
President, International
Wright Medical Technology Inc.

Caroline Carr
Vice President, Global Customer
Operations
ResMed Inc.

Executive Bulletin

4:15pm **Accessing International Markets**

Marjory E. Searing
Executive Vice President, Global Strategy and Analysis
AdvaMed

A solid grasp of the implications of healthcare reform initiatives, healthcare budgets, and new reimbursement policies is critical to navigating key international markets such as Japan, Europe, and Latin America. This presentation will illustrate how challenges to international market access can be approached and addressed.

5:00pm **Networking Reception**

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Wednesday

March 24, 2004

8:00am Continental Breakfast and Exhibition

8:30am Icebreaker and Introduction

8:45am Hoyer and Shaker Live Interview with:

Richard M. Levy, Ph.D.
Chairman of the Board, President, and CEO
Varian Medical Systems, Inc.

Learn the strategies employed to gain and sustain market leadership and fuel growth, first-hand from a prominent industry leader.

Executive Bulletin

9:45am Obtaining Financing and Attracting Venture Capital
Gain insight into both the public and private financing market for medical technology. Understand the sectors you compete with for capital, and the main value drivers for institutional investors.

Daniel R. Omstead, Eng.ScD
President and CEO,
Hambrecht & Quist Capital Management, Inc.,
and President
H&Q Lifesciences Investors.

10:30am Networking Break

11:00am Concurrent Roundtable Discussions
Select one of the following roundtables:

RT1

Innovative Problem-Solving in the New Product Development Cycle

Facilitator:
John Turn
Manager, Materials and Analysis
CTC Engineering Consultants

RT2

Is DTC Marketing Effective for Device Companies

Facilitator:
Kevin Tausend
Senior Vice President
Dorland Global Health Communications

RT3

Strategically Deploying Remote Diagnostics

Facilitator:
Dale Calder
President and Director
Axeda

RT4

Adding Mobility to Your Sales and Supply Chain

Co-Facilitators:
Herman De Prins
Director International IS
Guldan Corporation

Matt DiMaria
Senior Vice President
Everypath

Keynote Luncheon

12:30pm Secrets for Propelling Growth with a Platform Technology

Michael A. Baker
President and CEO
ArthroCare Corporation

Building a profitable, growing company around a platform technology is a rarity in the medical device world. Michael Baker, president and CEO of ArthroCare, will share strategies ArthroCare employed to successfully establish its Coblation® technology in a variety of medical specialties — landing the company on Forbes' list of Top 25 Fastest-Growing Tech Companies.

- How to enter a series of new markets with a flagship technology
- How to leverage corporate alliances to expand into new markets
- Acquisitions in a platform technology strategy — when is the prize worth the chase?
- What infrastructure investments are necessary to sustain rapid growth

1:20pm Vendor/Audience Crossfire

Managing New Product Development Outsourcing Relationships

Mike Wilkinson
President
Paragon Innovations

Joe Havrilla
Senior Vice President,
Product Development
Medrad, Inc.

Robert Price
Senior Research Fellow
Global Entrepreneurship Institute

Steve Wobschall
Commercial Director
FUJIFILM Medical Systems USA, Inc.

Tom Spalding
President
Nordview Pacific Laboratories, Inc. Biomedical / Medical Devices
MSC Software

2:15pm Global Excellence in Medical Devices Insights

A Preview: Frost & Sullivan's 2004 Global Excellence in Medical Device Awards recipients address what it takes to succeed in a challenging economy. Join in an animated discussion and brainstorm with the best.

3:00pm Networking Break

3:30pm Frost & Sullivan Analyst Mindshare: International Market Trends

Facilitator:
Charlie Whelan
Consulting Manager - Medical Devices
Frost & Sullivan

Our senior medical device, medical imaging, and patient monitoring analysts' perspectives on the social, demographic, and disease pattern trends in key markets in Asia, Europe, and the Americas that will benefit medical technology companies in coming years. The mindshare includes dedicated time for your questions to be addressed by our top analyst team.

4:30pm Chairman's Closing Remarks

5:00pm Global Excellence in Medical Devices 2004 Awards Reception

6:00pm Global Excellence in Medical Devices 2004 Awards Banquet

Join us as we celebrate innovation and leadership, with the presentation of these prestigious awards recognized by industry leaders, the investment community, and the media at the 3rd Annual Global Excellence in Medical Devices 2004 Award Banquet. See registration page for details.

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Thursday

March 25, 2004

Thursday Executive Exchange: CRM Sales and Marketing Analytics

Business success depends in large part on individual one-to-one, customer relationships. This exchange will explain the critical distinction between CRM and the traditional art of customer service. Find out how you can realize the tremendous profit potential for those who can deliver excellent customer service in the context of a relationship while effectively managing operation expenses.

8:30am Registration, Continental Breakfast, and Exhibition

Interactive

9:00am Do You Know Who Your Customers Are? The Foundations of Analytics

10:30am Networking and Refreshment Break

Interactive

11:00am Putting Analytics to Work

12:30pm Networking Luncheon

Interactive

1:30pm Concurrent Roundtable Discussions

A. Measuring the Effectiveness of CRM Initiatives

B. Partner Relationship Management

C. Global CRM

3:30pm Executive Exchange and Summit Concludes

"I valued the many presentations from high-level speakers on topics spanning the full spectrum of Healthcare. This was truly an opportunity to peer into the future of the industry through all its various facets. I was also very pleased with the numerous networking opportunities and came away with some important contacts. I look forward to next year!"

- Vik Sönfi, Director, Strategic Marketing and Commercial Development, Endo Pharmaceutical

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Thought Leaders

Medical Device 2004

Join

Minutes

of
best-in-class
professionals

Featured Thought Leaders

Benefit from the combined experience and expertise of Thought Leaders, all of whom will play an active role in stimulating, networking, and brainstorming at your interactive sessions:

Adrian Elfe
VP, Quality Assurance and
Regulatory Affairs
Spectranetics

**Adam Ruskin, PhD,
DVM**
Director of Clinical Trials
Natus Medical, Inc.

Andre Decarie
VP, Sales & Marketing
LifeCore Biomedical, Inc.

Bobby Keen
VP of R&D
Biosense Webster

Chris Calhoun
President & CEO
MacroPore Biosurgery, Inc.

Dan Roth
Director of Marketing -
Oximetry
Nellcor, Inc.

Darrell Johnson
GM - Telemetry and
Networking
GE Medical

Dave Bolhuis
GM, Global Business
Development
Kimberly-Clark
Corporation

Don DeLauder
Director, Product Innovation
and Advanced Development
Medrad, Inc.

Frank Guglielmo
VP of Marketing
C.R. Bard, Medical Division

Geri Robinson
VP, Sales & Marketing
Pulmonetic Systems, Inc.

Greg Cash
President & CEO
Vasomedical, Inc.

Harris Ravine
President & CEO
Fischer Imaging
Corporation

Janice Barstad
Sr. Director, Business
Development and Planning
St. Jude Medical

Jeff Gold
President & CEO
CryoVascular Systems, Inc.

Joel Nichols
Director, E-Business
Smith & Nephew

Joseph DeVivo
President & CEO
RITA Medical Systems, Inc.

Julie Tracy
VP of Marketing
Kyphon, Inc.

Karin Daly
VP, Brand Management
Philips Medical Systems

Keith Grossman
President & CEO
Thoratec Corporation

Ken Branham
VP of Sales
Nypro

Larry Huffman
VP, International Business
Development
TheraSense, Inc.

Laura Bohn
Director, Operations/Tandem
Process Driver
Ethicon Endo-Surgery

Lawrence Cohen
President
International Technidyne
Corporation

Lee Blumenfeld, MD
VP, Business Development
Baxter Healthcare

Lisa Zindel
VP of Marketing
Concentric Medical, Inc.

Marian Sacco
VP, Sales & Marketing
Adeza Biomedical, Inc.

Mark Kirtland
Sr. Director, Strategic
Marketing
Cytec Corporation

Melinda Neufeldt
Director, Innovations
Spacelabs Medical, Inc.

Michael Dale
CEO
ATS Medical, Inc.

Michael McBrayer
SVP, Business Development
dj Orthopedics, Inc.

Paul Nerí
VP, Continuous Improvement
St. Jude Medical

Peter Soltani
VP & GM of Direct
Radiography
Hologic

Richard Russo
EVP & GM - International
Osteotech, Inc.

Rick Ferreira
President & CEO
Alliance Medical
Corporation

Robert Price
Senior Research Fellow
Global Entrepreneurship
Institute

Ronnie Andrews
VP of Marketing, Lab
Systems Division
Roche Molecular

Ron Spivey
Director of Market Research
Becton Dickinson

Steve Wobschall
Commercial Director
FUJIFILM Medical Systems
USA, Inc.

Sung Pak
Director
Biosense Webster

Tim Still
VP, Sales & Marketing
Cholestech, Inc.

Tom McCall
Vice President,
Franchise Marketing
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Axeda Systems

Axeda Systems Inc. is the world's leading provider of device relationship management (DRM) enterprise software and services. The company's flagship product, Axeda DRM™, is a distributed software solution that lets medical instrument manufacturers remotely monitor, manage and service their deployed equipment around the world. Representative customers include: Abbott Laboratories, Beckman Coulter, and Varian Medical Systems.

Bowne Global Solutions

Bowne Global Solutions (BGS) is the leading provider of translation, localization, technical writing and interpretation services that enable businesses to deliver locally relevant and culturally connected products, services and communications anywhere in the world. BGS, which has its global headquarters in New York, is a business unit of Bowne & Co., Inc. (NYSE: BNE), a global leader in providing high-value solutions that empower our clients' communications.

Chesapeake Consulting

Chesapeake Consulting Inc. specializes in helping its clients create and implement the business improvement solutions that achieve rapid, significant, sustainable bottom-line improvement. Chesapeake's Enterprise Fitness approach draws on the best available models, methods and tools to enable each client company to identify and leverage its unique improvement opportunities.

CTC Engineering Consultants

CTC, an engineering firm in Santa Clara, California, provides expertise to clients making Medical Devices, Semiconductor Tools and Industrial Equipment. Engineers innovate solutions in materials and mechanical engineering, materials/systems/component testing, computational and failure analysis, and human factors. CTC offers fresh, responsive, problem solving. Expertise you need, when you need it.

Datasweep

Datasweep is the leader in operations performance management solutions for life sciences manufacturers. Our solutions uniquely enable companies to collect, aggregate, analyze and act on product and operational data from their enterprise and supply chain, improving process efficiencies and product quality, reducing product lifecycle costs, and ensuring regulatory compliance.

Dorland Global Health Communications

Dorland is an independent, full-service health communications agency with the ability to offer marketing communications, public relations, and medical education programs - across all media - for device and diagnostic companies and their brands. We provide financing expertise and have the capabilities to meet virtually any health communications challenge.

Everypath

Everypath is a mobile task automation software company, enabling business critical tasks to be performed on handheld devices to improve user productivity, reduce operating expense and increase management visibility. Our unique approach permits business processes to be abstracted from existing applications for use on virtually any mobile device.

MSC Software

MSC Software is the leader in Virtual Product Development (VPD) software and services for medical device, automotive, aerospace, general machinery, electromechanical and consumer products manufacturers worldwide. Using VPD solutions, manufacturers are compressing time and improving product reliability with less cost and risk through the use of integrated design, simulation and data management tools.

MSC Software employs more than 1500 people in 23 countries. For additional information about MSC Software, our technology, services and initiatives, please visit us at www.msc-software.com.

Northview Biosciences

Northview Biosciences, an independent laboratory offering GMP/GLP testing services to the medical device, pharmaceutical and biopharm industries. Northview specializes in sterility assurance, biocompatibility, analytical chemistry, microbiology, preclinical toxicology and pharmacology services. Northview is ISO 9001:2000 certified and AAALAC accredited with facilities located in Northbrook, IL, Hercules, CA and Spartanburg, SC.

Paragon Innovations, Inc.

Paragon Innovations is a leader in collaborative development of medical devices, applying an exclusive integrated approach that blends hardware and software processes with a manufacturing perspective for the medical industry. The company has the design expertise to decrease time-to-market, provide the documentation needed to get through FDA approval.

SAP

SAP is the world's leading provider of business software solutions, designed to meet the demands of companies of all sizes for flexible, modular solutions with fast ROI. Our Medical Technology Industry solution portfolio enables companies to achieve best-in-class performance in product innovation, customer intimacy, operational excellence, and regulatory compliance across the global medical device value chain. For more information on how SAP solutions can help your business adapt and grow, visit <http://www.sap.com> or contact Pete Bussey at peter.bussey@sap.com or 412-736-3438.

Technology Partners

Technology Partners teams with visionary entrepreneurs to build successful new companies. We serve principally as a lead investor and business adviser to technology-based ventures in our focus areas of next generation enterprise software, energy technology, biotechnology and medical devices, in particular interventional cardiology and neuroscience.

ABOUT OUR EXECUTIVE SUMMIT EXHIBITORS:

PA Consulting Group

PA Consulting Group is a leading management, systems and technology consulting firm. PA develops technology for its clients in areas ranging from wireless technology to life sciences.

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"The roundtable discussions provided valuable insights to how other companies in our industry were addressing issues. They provided the opportunity to ask those with experience direct questions, and share your "best practices" with colleagues."
- Joe Camarrata, VP, Global CRM, Siemens Medical USA

"The medical device field is a broad, waterfront; however, Frost & Sullivan always manages to put together an outstanding program that appeals to everyone's interests. Notwithstanding the top-notch presenters, the networking amongst peers is always enlightening."
- Jerry McLaughlin, President & CEO, CompuMed, Inc.

"I have been a thought leader at two Frost and Sullivan events, each time I come away with even more value than ever expected. The Healthcare summit proved a valuable opportunity to exchange ideas and to network with customers and colleagues. I look forward to participating again next year." - Ken Branham, Vice President Sales, Nypro Inc.

"Once again, the roundtable discussion was informative and insightful. The interaction amongst the participants was good and the facilitation excellent." - Geri Robinson, VP Sales & Marketing, Pulmonetic Systems.

"I enjoyed the opportunity to interact with a varied mix of upper-level, Marketing - oriented professionals from both the industry & agency sides." - Daryl M. Rogard, Director, Global Marketing Information, Allergan, Inc.

"I valued the many presentations from high-level speakers on topics spanning the full spectrum of Healthcare. This was truly an opportunity to peer into the future of the industry through all its various facets. I was also very pleased with the numerous networking opportunities and came away with some important contacts. I look forward to next year!" - Vik Seoni, Director, Strategic Marketing and Commercial Development, Endo Pharmaceuticals

"Once again, Frost & Sullivan has shown that their Executive Summits lead the industry. Our participation at the Healthcare & Life Sciences event not only proved a great industry networking opportunity, but also generated solid new business leads." - Ian Swanson, CEO, American Data Exchange Corp.

"The topics presented were timely and well done. The opportunity to network with such a large number of professionals facing similar challenges was helpful!" - Don Bjornstrom, Vice President, Instrumentarium Imaging, Inc.

EXECUTIVE BRIEFINGS



TOPIC MONITORS

Executive Briefings are a word-for-word transcription of the presentations from our events, as well as in-depth content from previous and future Frost & Sullivan Executive Summits.

Set up as an on-line portal to give different users access to the information via a personal user ID and password, Executive Briefings include transcribed speeches, PowerPoint slides, graphs, charts, biographies, Q&A sessions, and more! This is a powerful training tool for your staff members..... and saves attendees from taking notes!

Executive Briefings - Topic Monitor Service (\$695 for non-attendees, \$495 for attendees)

- A subscription service that lasts for one year
- Customers receive any Executive Summit material produced during the duration of the subscription related to a specific
- Topic and all previous content on that topic
 1. Choose one of five topics
 2. Advanced Marketing Research
 3. Competitive Intelligence
 4. Sales & Marketing Strategies
 5. Growth Strategies
 6. Life Sciences (Drug Discovery/ Medical Device Industry/Pharmaceutical Industry)

Executive Briefings - Comprehensive Service (\$995 for non-attendees, \$695 for attendees)

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- Customers receive all Executive Summit material produced during the duration of the subscription and all previous
- Content
- Timely information on five important topics
 1. Advanced Marketing Research
 2. Competitive Intelligence
 3. Sales & Marketing Strategies
 4. Growth Strategies
 5. Life Sciences (Drug Discovery/ Medical Device Industry/Pharmaceutical Industry)

EXECUTIVE SUMMIT GLOSSARY

CASE HISTORY

A practitioner-delivered, in-depth session which addresses a specific project or initiative relevant to Executive Summit issues. Case histories are directly drawn from "real-world" corporate experiences that outline timely business challenges, the steps taken to overcome them, and lessons learned, so that best practices may be shared and applied.

EXECUTIVE BRIEFINGS

Briefings and subscription services provide you with comprehensive Executive Summit materials to share with others in your business, or to use for reference (word-for-word transcripts of dynamic speaker presentations, professional biographies, complete Q&A sessions, PowerPoint slides, interactive participant survey results, and indispensable market intelligence and analysis). Available by event, industry, or service area.

EXECUTIVE FORUM

A 2-day networking interactive forum that begins Sunday morning and concludes by Monday evening. Sunday's focus is relaxed, recreation-based networking. Monday features an intense interactive full-day workshop broken up and facilitated by 4-8 industry leaders. These 90-minute workshops are highly interactive in nature, incorporating role-play, simulations, case scenarios, group exercises, discussion groups, training games, etc. Each workshop is structured to foster audience interaction and networking. The workshops enable attendees to apply what is being learned through practical exercises. The workshop does not incorporate formal podium presentations (one-way push of information); the concentration is on interplay between workshop leader and participants, and among participants themselves.

EXECUTIVE SUMMIT

An interactive program, exclusively from Frost & Sullivan, that utilizes all of its components to create a whole - speakers, attendees, vendors, and venue, all share an equal part in presenting a 360-degree view of the market. A key ingredient to the format is interactivity - more than 80 percent of the sessions and events are interactive. Each Executive Summit is comprised of three parts: Executive Forum, General Session, and Executive Exchange.

EXECUTIVE EXCHANGE

An advanced training course focused on essential skills required for industry participants and executives who want to advance their careers. These workshops typically cover management and leadership skills, communication, new technology, strategic alliances, competitive benchmarking, Internet research and other essential needs to further a career.

FACILITATOR

Leads the interactive Think-Tank and/or roundtable discussion. A qualified expert, responsible for steering dialog and maintaining focus on the issues presented. Encourages balanced interaction among participants.

GENERAL SESSION

The main event, featuring keynotes, panels, roundtables, ThinkTanks, and other interactive sessions, as well as networking events, and a dynamic exhibition hall featuring the industry's leading solution providers and top consulting firms.

INTERACTIVE SURVEY

This interactive workshop will allow participants working in groups to create a series of questions and answers to be compiled and inputted into an online survey. This is a survey created by the participants for the participants. At the close of the day, the survey will be available online and within the exhibit hall for you and your peers to complete. At the close of the general session, the results of the survey will be shared and analyzed. A terrific way to get an immediate benchmark of the market as it stands today.

MODERATOR

Leads a panel discussion, a crossfire session, or a Q&A. A qualified expert who coordinates panelists' pre-event and introduces, directs, clarifies and guides their discussions and questions from the participants and Thought Leaders.

PANEL DISCUSSION

Expert panelists (practitioners, not vendors) explore the issues presented to them by the moderator. Floor is open to questions relevant to the discussion theme, addressed to an individual panelist, or the panel as a whole. Participants are given an opportunity to have their "real-world" issues addressed by the experts, and benefit from the combined expertise of the panel.

PARTICIPANTS

The attendees. The majority of participants are highly-placed executive-suite level, EVPs, VPs, and Directors (typically decision makers). They not only serve as audience members, but also as group leaders bringing issues to light, and become immersed in all aspects of the Executive Summit from golf to Think Tanks to forums.

PRODUCT SHOWCASE

A 10-minute live demonstration of the featured vendor's/consulting firm's solution, located in a mini-theatre within or in the nearby exhibition hall. A brief amount of time will be allocated for Q&As at the conclusion of the demonstration.

Q&A

A group of speakers, facilitators, and/or moderators convening to address audience questions, either pertaining to their individual presentations, or to the industry as a whole. Questions may be addressed to a speaker specifically, or generally to the panel. Each Q&A professional has the opportunity to comment on the question if he/she chooses to add to the response. Content is participant-driven and the pace is quicker than that of a panel discussion.

ROUNDTABLE DISCUSSIONS

Concurrent informal, interactive roundtable discussions, each focused on topical matters of interest, is facilitated by industry experts. The objective of these sessions is to foster networking among the group, capture the primary issues to discuss, promote the cross-sharing of knowledge, and guide discussion to consensus or closure on key issues. Thought leaders will take an active role in these sessions to help promote interaction and bring a balanced perspective to the discussion.

SPEAKER

The executive in the trenches, the practitioner (not vendor), one who brings valuable insight to light. The speakers focus on primary challenges, needs, and strategies of executive management. Frost & Sullivan speakers are almost exclusively Fortune 1000 executives that bring cutting-edge insights, examine case histories, and share best practices.

SOLUTIONSWHEEL

Participants will have the opportunity during the General Session to participate in a series of rapid-fire one-on-one meetings with leading vendors in the marketplace. Participants are given approximately 2 minutes, seated in an outer circle of chairs to pose their question(s) to each exhibitor, moving around the wheel to the next exhibitor every two minutes. Participation is limited and will be filled on a first-come, first-served basis.

THINKTANK

Interactive brainstorming session facilitated by an industry expert. Facilitator introduces the key agenda items, and works with the participants in teams to problem-solve approaches to common challenges. The teams are then debriefed by the facilitator. Thought leaders will take an active role in these sessions to help promote interaction and bring a balanced perspective to the discussion.

THOUGHT LEADER

Executives from Global 2000 type organizations in charge of strategic initiatives at their organizations are placed in the audience to stimulate participation and provide a balanced perspective during interactive sessions. Thought Leaders help foster peer learning through active involvement in Roundtable discussions, Think Tanks, and crossfire sessions.

VENDOR/AUDIENCE CROSSFIRE

A CNN-style, moderated candid discussion. A panel of solution providers face a panel of Thought Leaders to address a series of pre-determined issues. The audience is given the opportunity to join the Thought Leader panel, or to raise questions at an open and/or roving microphone. The most pressing questions and controversial issues are debated in a lively and highly interactive manner. Thought Leaders will take an active role in these sessions to help foster interaction and bring a balanced perspective to the discussion.

EXECUTIVE SUMMITS • CALENDAR OF EVENTS

January 11-15, 2004
Scottsdale, AZ

Sales & Marketing 2004:
5th Annual Executive Summit, West
An Interactive Forum for Sales and Marketing
Executives Seeking to Maximize Revenue and Deliver a
Marketing ROI through Superior Sales, CRM &
Marketing Management.

March 14-18, 2004
San Francisco, CA

Medical Device 2004:
Executive Summit, West
Your Passport to the Future of the Medical Device
Industry.

May 16-20, 2004
East Coast Resort • TBD

Advanced Marketing Research:
7th Annual Executive Summit, East
Maximizing Effectiveness Through New Techniques,
Technologies, and Management Strategies.

Structuring Competitive Intelligence for
Greater Bottom-Line Impact:
11th Annual Executive Summit, East
An Interactive Forum for Competitive Intelligence,
Corporate Strategy, Business Development, and
Marketing Executives Seeking to Drive
Decision-Making.

July 11-15, 2004
East Coast Resort • TBD
Sales & Marketing 2004:
5th Annual Executive Summit, East
An Interactive Forum for Sales and Marketing
Executives Seeking to Maximize ROI Through Superior
Sales, CRM & Marketing Management.

September 19-23, 2004
West Coast Resort • TBD

Leveraging Emerging Technologies for Growth
An Interactive Forum for Marketing Executives Seeking
to Optimize Marketing Effectiveness with Customer-
Driven Strategies.

Business Applications in Wireless Technology:
The New Frontier
An Interactive Forum for Senior Executives Seeking to
Achieve Above-Market Growth Rates, Maximize
Existing Growth Portfolios, and Identify New
Opportunities.



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October 17-21, 2004
West Coast Resort • TBD
Structuring Competitive Intelligence
for Greater Bottom-Line Impact:
11th Annual Executive Summit, West
An Interactive Forum for Competitive Intelligence,
Corporate Strategy, Business Development, and
Marketing Executives Seeking to Drive
Decision-Making.

Advanced Marketing Research as a
Strategic Imperative:
7th Annual Executive Summit, West
Maximizing Effectiveness Through New Techniques,
Technologies, and Management Strategies.

Product Development 2004: Strategies for
Success
Product and Business Development Professionals will
Gather to Present Cross-Functional Launch and
Support Strategies

November 7-11, 2004
San Diego • CA
Frost & Sullivan's
Healthcare/LifeSciences Opportunities 2004
The premiere healthcare industry event: Your passport
to the future of life sciences, and the pharmaceutical
industries.

December 5-9, 2004
East Coast Resort • TBD
Growth Strategies 2004:
3rd Annual Executive Summit, East
Creating Shareholder Value through Revenue

"Our new

Executive Summit

format will bring

the content of

the program to life...

engaging, challenging, and

entertaining our

executive attendee base."

—David Frigstad,
Chairman of Frost & Sullivan.

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FROST & SULLIVAN

Medical Devices 2004

March 21-25, 2004 • Grand Hyatt • San Francisco, CA

Registration Form and Procedures

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San Antonio, TX 78229

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San Francisco, CA 94108
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Fax: 415 392 2536

We are proud to be presenting our March event at the Grand Hyatt in San Francisco. Frost & Sullivan has reserved a limited number of rooms for Executive Summit attendees at reduced rates. Please call the hotel directly for availability and reservations at 415 398 1234. Early reservations are strongly recommended.

Payment Procedures

Payment in full is required immediately upon registration. If, for any reason, you are unable to attend, a fully transferable credit will be issued to any other Frost & Sullivan Executive Summit within one calendar year (from the date of the Executive Summit you are registered to attend. It is with regret that Frost & Sullivan will not be able to issue refunds for any reason. Attendee fees include reception, refreshment breaks, luncheons, continental breakfasts, and substantial Executive Summit documentation. Every effort is made to ensure that the speakers noted in this brochure are present, but changes beyond the sponsors' control may occur. The program agenda will be updated biweekly and can be downloaded from:

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Registration/Pricing Schedule

- Complete Series
(March 21-25, '04, Sun-Thur): \$2,599
- Executive Forum & General Session
(March 21-24, '04, Sun-Wed): \$1,095
- General Session & Executive Exchange
(March 23-25, '04, Tue-Thur): \$2,095
- General Session Only
(March 23-24, '04, Tue-Wed): \$1,495
- Executive Forum Only
(March 21-22, '04, Sun-Mon): \$850
- Executive Exchange Only
(March 25, '04, Thur): \$850

Group Discounts Available

Contact: 1-877-GO-FROST
for details

Register Me as follows:

- Executive Forum (Sunday-Monday)
 - ☐ Global Medical Device Napa Valley Tour (\$50)
 - ☐ Cocktail Party Sunday (Included)

Workshop: Global Go to Market Strategist

- General Session (Tuesday-Wednesday)

Tuesday 12:30pm
Choose one of the following ThinkTanks™
MED OTT1 OTT2 OTT3

Wednesday 11:00am
Choose one of the following RoundTables
MED ORT1 ORT2 ORT3 ORT4

- ☐ Wednesday 6:30pm
Medical Devices 2004 Awards Reception and Banquet \$100

- ☐ Executive Exchange (Thursday)

- Executive Briefings

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Updated: 01-28-04

F R O S T & S U L L I V A N

**2004 Global Excellence in the Medical Device Industry
Awards Banquet
March 24, 2004
Grand Hyatt - Union Square
San Francisco, California**

* There will be a Frost & Sullivan registration desk. Please check in after 8am.

Timeline:

8:45-9:45am	Live Interview! - Richard M. Levy, Chairman of the Board, CEO, Varian Medical Systems, Inc.
2:15-2:45pm	Live Mover & Shaker Interview! - (TBA)
2:45-3:30pm	CEO Panel Discussion
5:00-6:00pm	Networking Reception
6:00-7:15pm	Dinner
7:15-7:20pm	Welcome Speech - David B. Frigstad, CEO, Frost & Sullivan
7:20-7:35pm	Keynote Speech - John W. Wood Jr., President & CEO, Analogic Corporation
7:35-9:30pm	Awards Presentations
9:30-10:30pm	Reception area will re-open

** There will be flexibility between the end of dinner and the beginning of the awards presentations. Ending time is estimated.*

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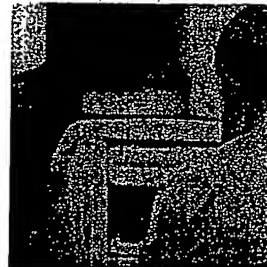
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Company Information

Frost & Sullivan was founded in 1961 in New York City with a specific mission: Publish world-class market consulting information and intelligence on emerging high-technology and industrial markets.



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Frost & Sullivan works interactively with clients to develop innovative growth strategies.

Frost & Sullivan was founded in 1961 in New York City with a specific mission: To publish world-class market consulting information and intelligence on emerging high-technology and industrial markets. The company soon developed a reputation as one of the world's leading companies in growth consulting and corporate training. Now well into its fourth decade, Frost & Sullivan has won a worldwide reputation for publishing high-quality growth consulting and training studies in more than 20 major industries.

Through the 1960s, Frost & Sullivan pioneered market consulting, monitoring new technologies, tracking changes in distribution channels, forecasting market trends, and performing strategic analysis of competitors. Frost & Sullivan was always at the forefront - just as new markets and technologies appeared - with up-to-date research on potential markets. Frost & Sullivan was the first company to offer its services on electronic tape media, delivering world military equipment market data in 1962.

In the 1970s, Frost & Sullivan established a European headquarters in London and developed the first pan-European growth consulting reports. The company founded its **Corporate Training Division** in 1972. Today it is one of Europe's premier corporate training centers. The training focuses on corporate management, leadership skills, sales and marketing, data communications, and information technology.

Frost & Sullivan's **Executive Summits** division was also launched in the 1970s. Frost & Sullivan Executive Summits are uniquely designed to integrate training, research, and strategic growth consulting skills with communication among the players in the industry. The events provide senior-level management executives with insights into market opportunities, competitive threats, technical trends, emerging markets, and competitive strategies. Frost & Sullivan continues to provide participants with unique strategic content, competitive benchmarking, industry focus, and the opportunity to network with other key industry executives.

Our one-of-a-kind Executive Summit format leverages the mass of brainpower of all of our participants. Jam-packed with dynamic networking activities and hands-on content, our programs are over 80% interactive. Brainstorm with your peers and validate solutions to your personal needs and challenges through workshops, ThinkTanks, panels, roundtables, and mindshares.

In the 1980s, Frost & Sullivan developed the "Market Engineering" Consulting system and began working directly with clients struggling to address key industry challenges, opportunities, and problems. The "Market Engineering" system has proven to be very effective in addressing our clients' business challenges and has developed into a strong and thriving Frost & Sullivan consulting business. The **Market Engineering Consulting** program also drove the development of a series of **Executive Tutorial** manuals, which help our clients develop their own strategies and solutions to their business challenges.

In the 1990s, client demand supported Frost & Sullivan's expansion into Asia with research and consulting offices in Singapore, China, India, and Japan. The continuing economic growth and potential of these markets will not be overlooked by Frost & Sullivan or its clients.

Frost & Sullivan also developed several worldwide "Customer Engineering Centers" in the early 1990s to fulfill our clients' requests for more customer surveys and analysis on new product niches and product development ideas. These centers have world-class survey instrumentation and analysis skills as well as covering virtually every language in the world. They play a major role in helping our clients become more "customer-focused".

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The year 1998 witnessed the successful launch of a new division called **Stratecast Partners**. This division delivers actionable, conclusive and insightful strategic analysis utilized by telecommunications industry senior executives in making critical business strategy, technology strategy and tactical strategy decisions. Stratecast Partners offers a three part solution made up of Access to its strategy staff; Access to the "fruits" of its sustaining research and analysis practice; and, Access to its incomparable strategic assessments of communications companies and technology sectors. Please visit www.stratecast.com for more information on the division.

The **Decision Support Database service (DSD)** was developed in 2000 to provide clients with baseline market measurements standardized and unified by country and by year. These have become an indispensable tool for client's business planning and forecasting projects.

In 2001 Frost & Sullivan successfully launched the **Country Industry Forecast (CIF)** service which provides economic analysis and forecasting by industry rather than by country. Also, launched in 2001 was a program of comprehensive industry newsletters provided to our clients to keep them abreast of market trends and news. **Market Insights** are written by our global analyst and consulting team to provide value to each issue.

In March 2001, Frost & Sullivan acquired **Technical Insights (TI)** adding a superior technology research capability to its suite of services. Technical Insights offers several technology subscription services as well as high-end technology analysis reports. TI's mission is to provide intelligence to executives and technology managers worldwide on technical developments that seem poised for the fastest growth.

Expanding on Frost & Sullivan's success of our popular **Analyst Briefings and Executive Summits**, Frost & Sullivan's **eBroadcast Division** delivers cutting-edge business strategies and solutions to its executive clients through interactive forums on the Internet. By combining the immediacy of the Web with the impact of streaming audio and video, Frost & Sullivan's eBroadcasts are one-hour topic-specific seminars packed with the information and insights needed to address real-world business needs.

2002 was a big vision year for Frost & Sullivan as we completely restructured and focused our client value proposition and vision based on growth and partnership with our clients. In this year we developed our **Growth Partnership Services** which describes our new integrated service approach to our client relationships and our new **Growth Consulting Model** and methodologies.

In 2004 we expanded our global coverage into Asia and Latin America with new offices in Brazil, Mexico, Japan and Korea.

For 2005 and beyond the future looks bright for Frost & Sullivan and its client partners.

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On the research side of our business we engage with customers on a number of different levels. Customers can buy growth consulting to create strategic programs, market consulting for tailored research, annual interactive subscriptions services, or individual research services. We also have a Training division offering tailored development solutions as well as public courses, and we run a series of International Events and Conferences. [View Brochure](#)



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Growth Partnership Services

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Our mission is to enable world-class companies to increase productivity and performance through their people.

Technical Insights

Technical Insights: Frost & Sullivan provides clients with real-time technology intelligence.

Best Practices

Frost & Sullivan Best Practices recognizes outstanding industry achievements by presenting Frost & Sullivan Awards to top companies in regional and global markets

Country Industry Forecasts

Country Industry Forecasts: Dynamic global business environment, knowledge of country-specific factors for business.

Business and Financial Services

Frost & Sullivan's Business and Financial Services group serves clients around the world in all aspects of financial analysis, market research and monitoring, due diligence, idea generation, opportunity analysis, investment valuation, and other proprietary research

Our Research

Research Services: Frost & Sullivan market analysis and qualitative research.

Consulting

Frost & Sullivan's growth consulting program is a focused approach to market intelligence for your own business. Our growth consulting services are designed to help you successfully address the business challenges and growth opportunities you face.

Events

In 2002, Frost & Sullivan unveiled to its executive clients a new concept for high-level, strategic learning and sharing of peer experiences.

Stratecast Partners

Competitive Strategy: Stratecast Partners provides actionable, conclusive coverage of the telecommunications industry.

Customer Research

Customer Engineering Services (CES) are designed to improve your company's customer focus and drive sales.

Decision Support Database

Decision Support Database: Frost & Sullivan's specialized business line portal research.

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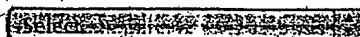
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